Oracle® Retail Item Planning

Installation Guide

Release 13.2.1

E18350-01

October 2010

ORACLE®

Oracle Retail Item Planning Installation Guide, Release 13.2.1

E18350-01

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Oracle Retail Item Planning Installation Guide, Release 13.2.1

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- Do you need different information or graphics? If so, where, and in what format?
- Are the examples correct? Do you need more examples?

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Preface

Oracle Retail Installation Guides contain the requirements and procedures that are necessary for the retailer to install Oracle Retail products.

Audience

This Installation Guide is written for the following audiences:

- Database administrators (DBA)
- System analysts and designers
- Integrators and implementation staff

Documentation Accessibility

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Related Documentation

For more information, see the following documents in the Oracle Retail Item Planning Release 13.2.1 documentation set:

- *Oracle Retail Item Planning Release Notes*
- *Oracle Retail Item Planning User Guide for the RPAS Classic Client*
- *Oracle Retail Item Planning User Guide for the RPAS Fusion Client*
- *Oracle Retail Item Planning Operations Guide*

For more information about the Fashion Planning Bundle applications see the following documentation sets:

- Oracle Retail Item Planning Configured for COE documentation
- Oracle Retail Clearance Optimization Engine documentation
- Oracle Retail Assortment Planning documentation
- Oracle Retail Merchandise Financial Planning documentation
- Oracle Retail Size Profile Optimization documentation

For more information about the RPAS Fusion Client, see the following documents in the Oracle Retail Predictive Application Server Release 13.2.1 documentation set:

- *Oracle Retail Predictive Application Server Release Notes*
- *Oracle Retail Predictive Application Server Licensing Information*
- *Oracle Retail Predictive Application Server Installation Guide*
- *Oracle Retail Predictive Application Server Administration Guide for the Classic Client*
- *Oracle Retail Predictive Application Server Administration Guide for the Fusion Client*
- *Oracle Retail Predictive Application Server User Guide for the Classic Client*
- *Oracle Retail Predictive Application Server Online Help for the Classic Client*
- *Oracle Retail Predictive Application Server Configuration Tools User Guide*
- *Oracle Retail Predictive Application Server Configuration Tools Online Help*
- *Oracle Retail Predictive Application Server User Guide for the Fusion Client*
- *Oracle Retail Predictive Application Server Online Help for the Fusion Client*

For more information about RPAS and the ODI Enabled Integration, see the following documentation sets:

- Oracle Retail ODI Enabled Integration documentation
- Oracle Data Integrator documentation
- Oracle Retail Predictive Application Server documentation

Supplemental Documentation on My Oracle Support

The following supplemental documentation is also available in the My Oracle Support Knowledge Base.

My Oracle Support Note ID 1132783.1 – Oracle Retail Fashion Planning Bundle Reports Documentation

The Oracle Retail Fashion Planning Bundle Reports package includes role-based Oracle Business Intelligence (BI) Enterprise Edition (EE) reports and dashboards that provide an illustrative overview highlighting the Fashion Planning Bundle solutions. These dashboards can be leveraged out-of-the-box or can be used along with other dashboards and reports that may have already been created to support a specific solution or organizational needs. This package includes dashboards for the Assortment Planning, Item Planning, Item Planning Configured for COE, Merchandise Financial Planning Retail Accounting, and Merchandise Financial Planning Cost Accounting applications.

The Oracle Retail Fashion Planning Bundle Reports documentation set includes the following documents that describe how you can install and use the reports and dashboards:

- *Oracle Retail Fashion Planning Bundle Reports Installation Guide* – This guide describes how you can download and install the Fashion Planning Bundle reports. This guide is intended for system administrators and assumes that you are familiar with the Oracle Retail Predictive Application Server (RPAS) and Oracle BI EE.
- *Oracle Retail Fashion Planning Bundle Reports User Guide* – This guide describes the reports and dashboards included for the Oracle Retail Fashion Planning Bundle solutions.

Customer Support

To contact Oracle Customer Support, access My Oracle Support at the following URL:

`https://support.oracle.com`

When contacting Customer Support, please provide the following:

- Product version and program/module name
- Functional and technical description of the problem (include business impact)
- Detailed step-by-step instructions to re-create
- Exact error message received
- Screen shots of each step you take

Review Patch Documentation

When you install the application for the first time, you install either a base release (for example, 13.1) or a later patch release (for example, 13.1.2). If you are installing the base release, additional patch, and bundled hot fix releases, read the documentation for all releases that have occurred since the base release before you begin installation. Documentation for patch and bundled hot fix releases can contain critical information related to the base release, as well as information about code changes since the base release.

Oracle Retail Documentation on the Oracle Technology Network

Documentation is packaged with each Oracle Retail product release. Oracle Retail product documentation is also available on the following Web site:

http://www.oracle.com/technology/documentation/oracle_retail.html

(Data Model documents are not available through Oracle Technology Network. These documents are packaged with released code, or you can obtain them through My Oracle Support.)

Documentation should be available on this Web site within a month after a product release.

Conventions

The following text conventions are used in this document:

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
italic	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
`monospace`	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

1 Introduction

This document provides instructions on installing Oracle Retail Item Planning. It provides detailed instructions on how to install an Item Planning domain using a configuration created in the RPAS Configuration Tools. This document does not describe how to create the actual configuration.

Supplemental installation guides are referenced in this document. The *RPAS Installation Guide* and *RPAS Configuration Tools User Guide* must be obtained prior to beginning the installation process. Read these documents in their entirety before beginning the installation.

About This Document

This document contains information for full and patch installations:

- Chapter 2, "Full Installation: UNIX Environments". Refer to this section if you are performing a full installation.
- Chapter 3, "Patch Installation". Refer to this section if you are performing a patch installation.

Please read this entire guide before beginning the installation process to ensure you understand the installation process and have all the necessary documentation, hardware, and software available.

Hardware and Software Requirements

The following table provides information about the current release.

Table 1–1 Hardware and Software Requirements

Requirement	Details
Supported RPAS version	13.2.1
Supported OS, Server and Compilers	■ Oracle Solaris 10 (SPARC): GCC 4.2.3 (32 bit) ■ AIX 5.3 (POWER) - TL5 or greater: GCC 4.1.1 (32 bit) ■ AIX 6.1 (POWER) - TL4: GCC 4.3.3 (32 bit) ■ HP-UX 11.31 (Itanium): ACC 6.20 (64 bit) ■ Oracle Enterprise Linux 5, Update 3 (OEL 5.3): GCC 4.1.2 (64 bit) ■ Red Hat Enterprise Linux 5.3: GCC 4.1.2 (64 bit)
Supported OS, Client	■ Microsoft Windows XP ■ Microsoft Windows Vista
Required 3rd Party Software	Oracle Java Runtime Environment (JRE) 1.5 ■ For AIX, the JRE version must be the 32-bit version of Java 1.5 SR1 or higher. **Notes:** ■ Oracle JRE 1.6 is also certified, but it is not necessary to upgrade to JRE 1.6. ■ If using SPO on the RPAS Fusion Client and if the Fusion Client is installed on a WebLogic server that resides on the same system as the RPAS server, you must use Java 1.6. ■ When installing Java, avoid enabling AutoUpdate because it may update the Java version without prompting.
For ODI Enabled Integration of the Fashion Planning Bundle (Optional)	Oracle Data Integrator 10.1.3.5

Supported Oracle Retail Products

Item Planning is part of the Oracle Retail Fashion Planning Bundle. The Fashion Planning Bundle is the integration of Item Planning (IP), Clearance Optimization Engine (COE), Assortment Planning (AP), Merchandise Financial Planning (MFP), and Size Profile Optimization (SPO) as a full-suite planning solution for fashion retailers.

The following Oracle Retail products are supported:

Table 1–2 Supported Oracle Retail Products

Product	Version
Oracle Retail Merchandise Financial Planning (MFP)	13.2.1
Oracle Retail Assortment Planning (AP)	13.2.1

Additional Documentation

See the following additional documentation for installing, managing, and using the RPAS Fusion Client and Item Planning:

- Additional RPAS Documentation:
  - *Oracle Retail Predictive Application Server Installation Guide*
  - *Oracle Retail Predictive Application Server Administration Guide for the Fusion Client*
  - *Oracle Retail Predictive Application Server User Guide for the Fusion Client*
- Additional Item Planning Documentation:
  - *Oracle Retail Item Planning User Guide for the RPAS Fusion Client*

Road Map for Installing Item Planning

This guide explains how you can install and set up the Item Planning application. In order to install Item Planning for production, you must perform the following tasks in a sequence:

Task	Description
Pre-installation Tasks	
1.	Install and set up the RPAS Infrastructure. For more information, refer to the *Oracle Retail Predictive Application Server Installation Guide*.
2.	Install and set up the RPAS Client. RPAS Release 13.2.1 includes the RPAS Classic Client and RPAS Fusion Client. For more information, refer to the *Oracle Retail Predictive Application Server Installation Guide*.
Installation Task	
3.	Access the Item Planning installation software and install the application. For more information, see Chapter 2, "Full Installation: UNIX Environments".

Note: The Item Planning installation software enables you to install the taskflow and online help files for the RPAS Fusion Client. In order to install the taskflow files, the RPAS Fusion Client must already be installed.

2

Full Installation: UNIX Environments

The installation of the server-side RPAS components on UNIX operating systems is accomplished using Java-based installation programs that are included with the installation package.

The Item Planning Installer automates the following:

- Installation of the Item Planning mock install configuration
- Installation of the Item Planning configuration for the RPAS Fusion Client. For more information on installing the RPAS Fusion Client, refer to the *Oracle Retail Predictive Application Server Installation Guide*.
- Creation of a sample Item Planning domain

This document assumes that the RPAS Installer process (from the *RPAS Installation Guide*) has been completed prior to using the Item Planning Installer.

Preparation

The RPAS server components required prior to this installation process are available from Oracle's E-Delivery web site, http://edelivery.oracle.com, and My Oracle Support, https://support.oracle.com.

Environment Variable Setup Script

Before running the solution installer, source the retaillogin.ksh script. The script is located in the root of the base directory where RPAS was installed unless the default was overwritten when specifying directory paths.

Source the script from inside the directory where the script is located:

```
. ./retaillogin.ksh
```

Or, include the full path after the period ".":

```
. /<base_directory>/retaillogin.ksh
```

Note: The preceding period and space (". ") must be included at the beginning of the command when executing the script.

Include this path and script in the .profile in your home directory (~/.profile) if you want to have this environment setup script run during login.

This script sets up environment variables, such as RPAS_HOME and RIDE_HOME, which are required for RPAS to run properly.

Downloading the Item Planning Media Pack

The following procedure provides information about extracting the Item Planning media pack and its contents.

1. Create a directory to store the Item Planning media pack and download the media pack to this location. This directory is referred to as [IP Installation].
2. Extract the media pack to this location. Once extracted, two directories appear: CDROM and DOCS.

   The CDROM folder contains the itemplan.zip file, which contains the Item Planning solution.

   The DOCS folder contains the Item Planning documentation.

Installing Item Planning

The following procedure provides information about installing Item Planning.

1. Create a directory to store the Item Planning Media Pack on the target server. This directory will be referred to as [IP Installation]. It is the location where the Item Planning installation routine is run.
2. Using FTP in binary mode, transfer the Item Planning Media Pack to the [IP Installation] directory on the target server.
3. Extract the package to the [IP Installation] directory.

   ```
   cd [IP Installation]
   unzip [Item Planning Media Pack]
   ```

4. Extract the Item Planning Installer.

   ```
   cd CDROM
   unzip itemplan.zip
   ```

5. Change directories to the root of the [IP Installation] directory and run the Item Planning Installer:

   ```
   cd itemplan
   ./install.sh
   ```

   Note: The command must be executed with the preceding period and forward slash (./).

   If this process is being run on an X-Windows emulator (such as Exceed), graphical user interface to the Installer appears. If you are running in console mode through a terminal emulator, the text interface to the Installer appears.

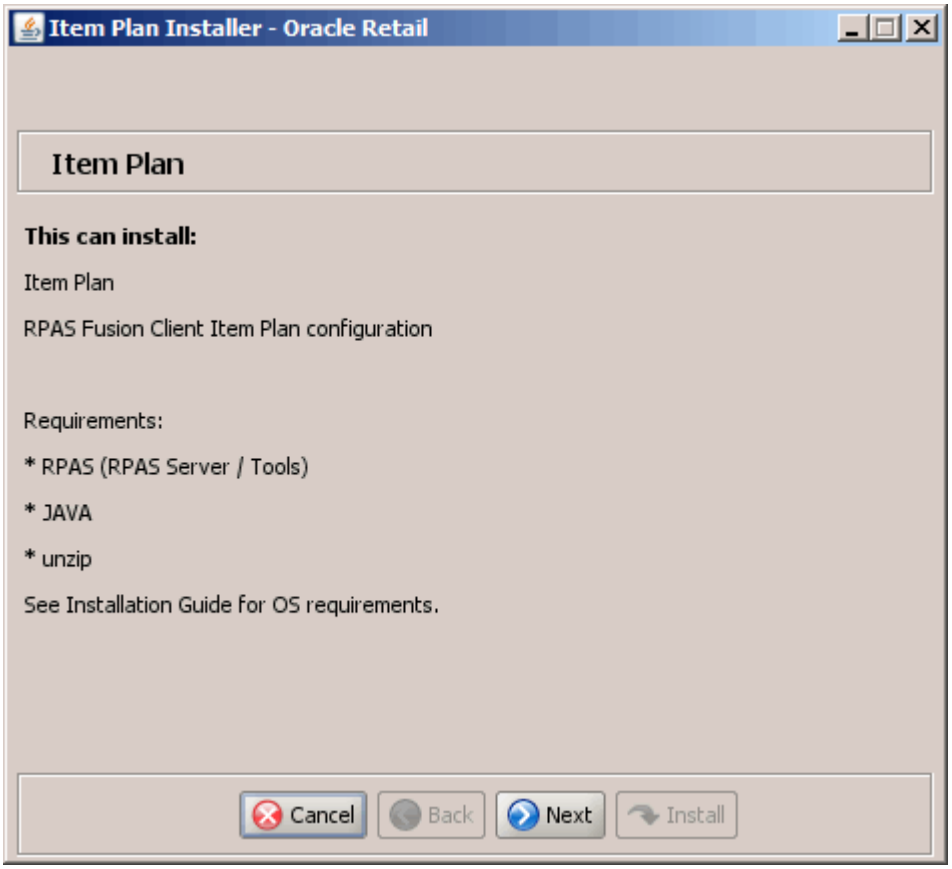
   In both cases, the requested information is identical. In the GUI, you may be shown a check box to signal whether you want a component installed; in text mode, you are prompted for a response of **true** or **false**.

Note: In text mode, the default value appears in square brackets []. To use the default value and continue, press **Enter**. If you want to use a different value, enter the new value. When prompted to create a directory, respond with **y** or **yes** and press **Enter**.

6. The Item Planning Installer screen appears and displays the components that are installed during installation process and the required components.

   Click **Next** to continue.

Figure 2–1 Item Plan Installer Screen



7. The Choose Components to Install screen appears.

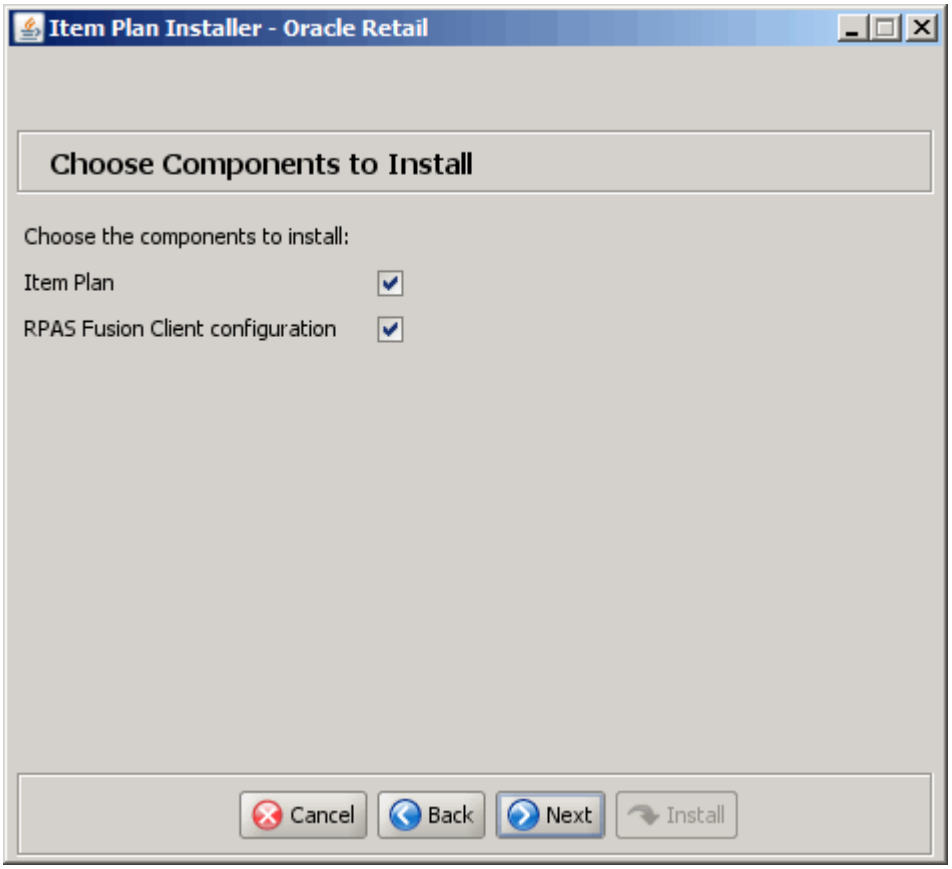
   Select the following options:

   - **Item Planning Server install with domain** – Select this option to install the Item Planning server with the domain.
   - **RPAS Fusion Client configuration** – Select this option to install the RPAS Fusion Client configuration for Item Planning. For more information on the configuration files included for the RPAS Fusion Client, see Configuration Files for the RPAS Fusion Client.

   If you do not want to install the RPAS Fusion Client configuration, clear this check box, and skip steps 10 and 11.

   Click **Next** to continue.

Figure 2–2 Choose Components to Install Screen



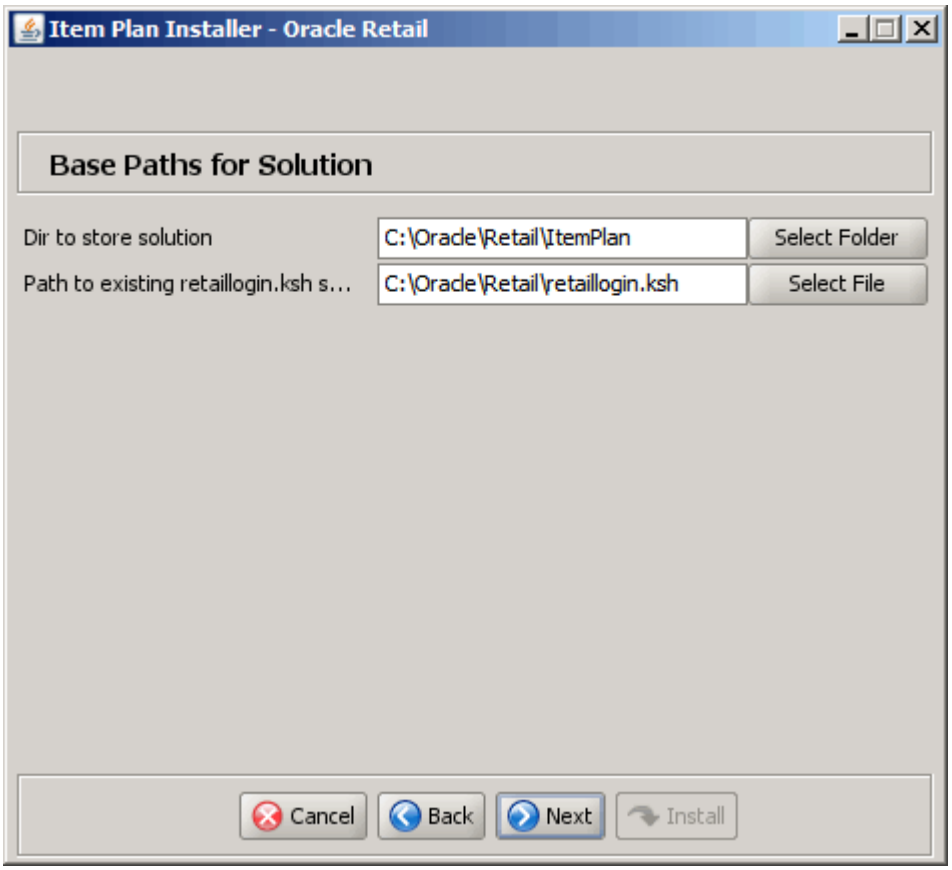
8. The Base Paths for Solution screen appears.

   Enter the relevant information in the following fields:

   - **Dir to store solution -** Enter the directory path where your solution should be stored.
   - **Directory and filename for Retail login script** - Enter the path and file name to the retailogin.ksh script created during RPAS installation.

   Click **Next** to continue.

Figure 2–3 Base Paths for Solution Screen

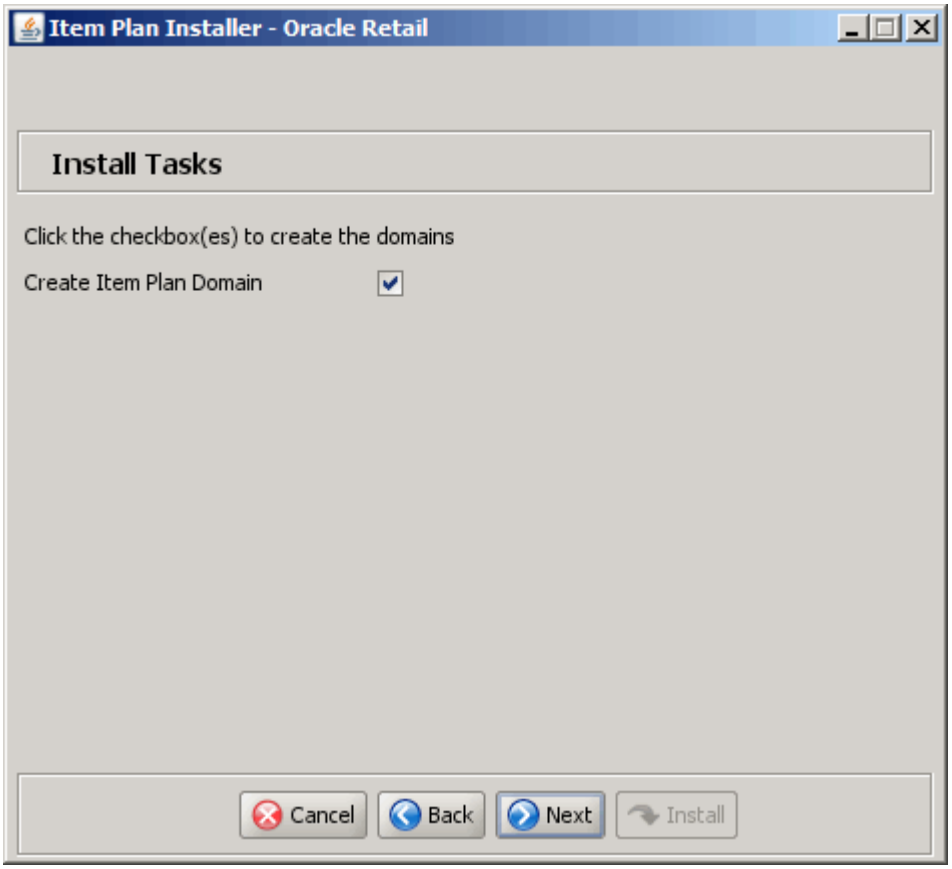


9. The Install Tasks screen appears.

   - Select **Create Item Plan Domain** option, which is selected by default, to create the Item Planning domain.
   - Deselect this option to have all required components to support an Item Plan domain installed without creating the domain.

   Click **Next** to continue.

Figure 2–4 Install Tasks Screen



10. The Fusion Location Information screen appears.

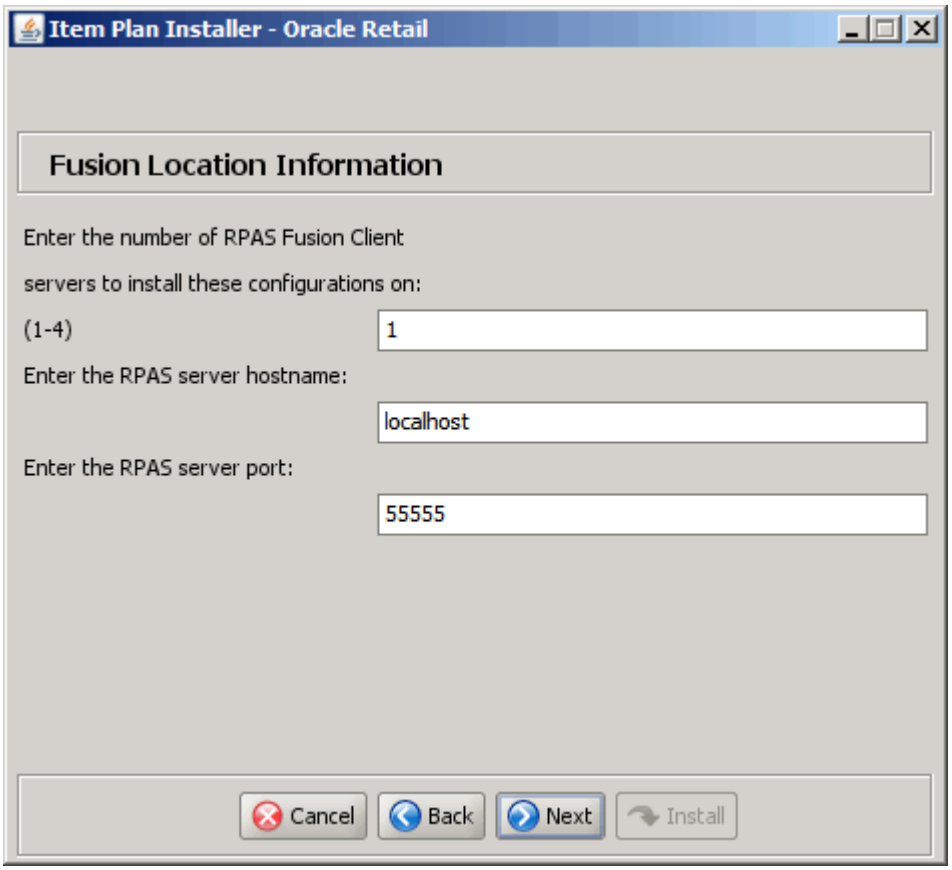
    - Enter the number of servers running the RPAS Fusion Client where you want to install the Item Planning configuration. If the RPAS Fusion Client is running on a single server, enter 1. If you have a clustered installation, you can enter up to four servers.
    - Enter the host name and port number of the RPAS server.

    If you are not installing the RPAS Fusion Client configuration, skip this step and step 11.

    Click **Next** to continue.

    Note: The Fusion Location Information screens appear when you select the RPAS Fusion Client configuration check box on the Choose Components to Install screen.

Figure 2–5 Fusion Location Information Screen

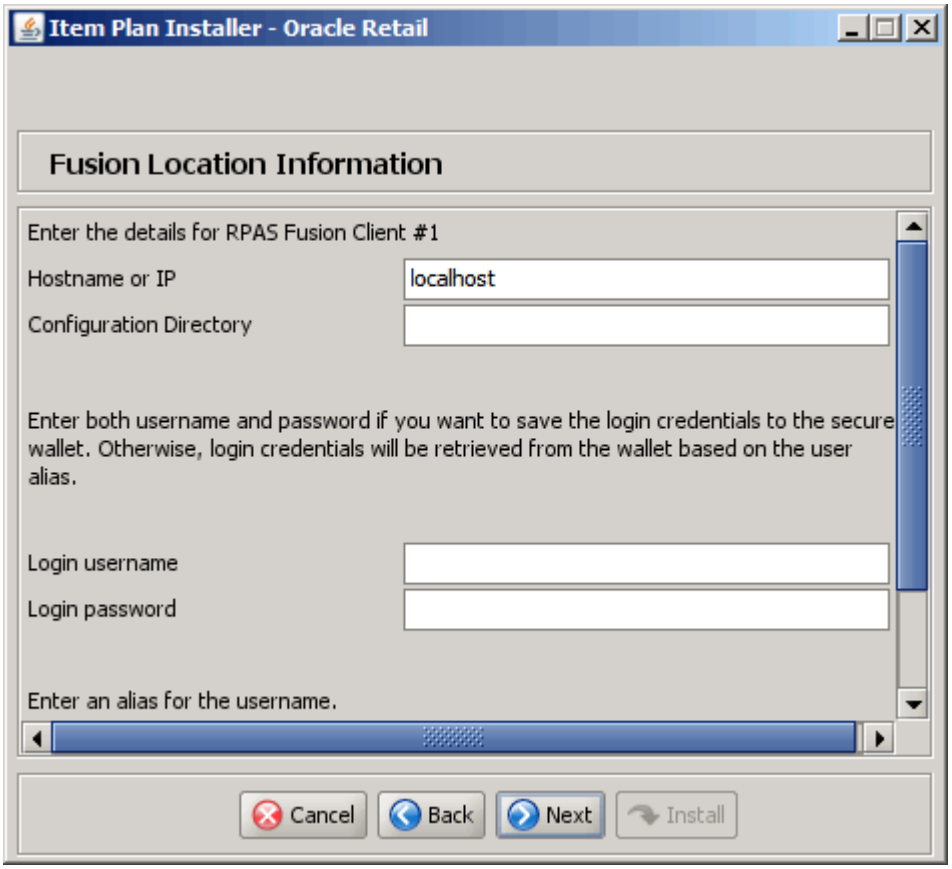


11. Based on the number of servers you entered, the Fusion Location Information screen appears with the following set of fields for each server configuration:

    - **Hostname or IP** – Enter the host name or IP address of the server where the RPAS Fusion Client is installed.
    - **Configuration Directory** – Enter the location of the config directory available at the location where the RPAS Fusion Client is installed.
    - **Login username** – Enter the user name to log on to the server where the RPAS Fusion Client is installed.
    - **Login password** – Enter the password associated with the user name.
    - **Login username alias** – Specify an alias name for the administrative user. Specifying an alias name for the administrative user enhances the security for the application. When left blank, the alias name defaults to the administrative user name.

    Click **Next** to continue.

Figure 2–6 Fusion Location Information Screen



Note: As part of the Oracle Software Security Assurance, sensitive information such as user credentials for the RPAS Fusion Client are encrypted and stored in a secure location in the application installation directory. This location is called the Oracle Wallet.

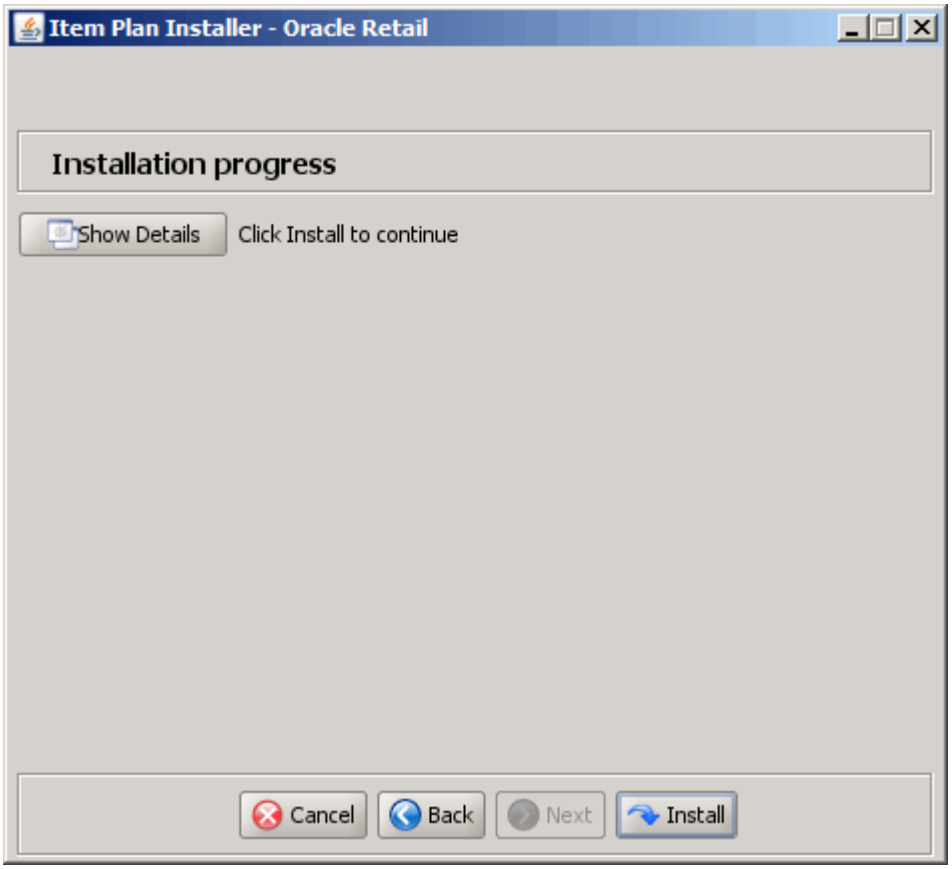
When the installation starts, the administrative user credentials will be retrieved from the Oracle Wallet based on the alias name specified in this screen.

12. The Installation Progress screen appears. Once you are ready to begin installation, click **Install**.

    This screen also displays the progress of the installation routine. Select **Show Details** to view the log output as the installation is performed. If you do not select to view the details, a graphical representation of the installation steps appears. As each step is completed, the color changes to show you the progress.

    You can toggle between detailed mode at any time during or after the installation.

Figure 2–7 Installation Progress Screen



13. When the installation has finished, the **Finished** message appears. Click **OK** to close the dialog box.

14. To view the installation details, select the **Show Details** button. The screen displays two tabs, the Output tab and the Error tab. It is recommended that you review these tabs for any issues that may have occurred during the installation process.

    If you want to view the log again at a later date, a text copy is saved in the directory [IP Installation]. The log file is named based on the product and timestamp, followed by the .log extension.

    Created as part of this process is the make_domain.itemplan file located in [Solution Install Dir] entered previously. This file contains all of the required parameters needed to support the domain installation. If necessary, this file may be modified if the default parameters are not appropriate for your particular environment.

    Notes:

    - The domain install process may also include post-installation data loading scripts specific to the Item Planning configuration. These scripts, if present, may also be modified.
    - For additional information on installing RPAS domains manually, see to the *RPAS Installation Guide*.

15. Click **Exit** to close the Installer.

    Notes:

    - Before starting the DomainDaemon, you must first source the solution's environment.ksh script. This loads all environment variables required by RPAS to interact with your solution's workbooks. To do this, either in shell or with an addition to your .profile, add **. [Solution Install Dir]/bin/environment.ksh**.
    - If you have re-installed Item Planning, you must edit a help file to use the Item Planning Online Help in the RPAS Fusion Client.

      Manually edit the rgbu_planning_home/Help/ohwconfig.xml file by removing the following duplicate line:

      ```
      <helpSet xmlns="" id="<shortProductName>"
      location="<shortProductName>/<shortProductName>-help.hs"/>
      ```

      If this duplicate line is not removed, a "500 Page Not Found" error occurs when attempting to access the online help in the RPAS Fusion Client.

Configuration Files for the RPAS Fusion Client

> **Note:** This section describes the optional installation method that involves setting up the RPAS Fusion Client configuration and online help for the Item Planning configuration. If you chose to install the Fusion Client configuration files using the Item Planning installer, you can skip this section.
>
> Before proceeding ahead, ensure that you have appropriate access privileges on the server running the RPAS Fusion Client.

Along with the files to install the Item Planning solution and domain, the IP installation media pack also includes the RPAS Fusion Client configuration and Online help files that you must install if you want to use Item Planning on the RPAS Fusion Client.

These files are available at the following location within the [IP Installation] directory:

```
[IP Installation]/itemplanning/fusion
<server-name>{RPASServerName}</server-name>
```

During the Item Planning installation, these files are automatically copied over to the configuration directory where the RPAS Fusion Client is installed. The installation also ensures that the following RPAS Fusion Client configuration files are updated to reflect the Item Planning installation:

- `ProfileList.xml` - Located in the [RPAS Fusion Client Installation]/config/rpas directory, this XML file includes the domain configuration available for use with the RPAS Fusion Client.
- `ohwconfig.xml` - Located in the [RPAS Fusion Client Installation]/config/Help directory, this XML file includes the Online help configuration for the RPAS Fusion Client.

If you did not install the Fusion Client configuration files during the Item Planning installation, you can choose to do one of the following tasks:

- Run the Item Planning installer again, and select to install only the RPAS Fusion Client configuration.
- Run the RPAS Fusion Client installer again, and specify the Item Planning domain configuration. For more information on the RPAS Fusion Client installation, refer to the *Oracle Retail Predictive Application Server Installation Guide*.
- Configure the RPAS Fusion Client for Item Planning manually. For more information, see Configuring the RPAS Fusion Client for Item Planning.

Configuring the RPAS Fusion Client for Item Planning

> **Note:** This section describes the optional configuration method that involves setting up the RPAS Fusion Client with the Item Planning configuration. If you chose to install the Fusion Client configuration files using the Item Planning installer, you can skip this section.
>
> Before proceeding ahead, ensure that you have appropriate access privileges on the server running the RPAS Fusion Client.

This section describes how you can set up a domain connection manually.

To set up an additional domain connection:

1. Once you have the Item Planning domain set up, navigate to the following location in the RPAS Fusion Client installation directory:

   ```
   <RPAS_Fusion_Client_Installation>/config/rpas/
   ```

2. In a Text Editor, edit the **ProfileList.xml** file, and append a connection specification for your domain in the following syntax:

   ```
   <connection-spec name="{DomainConnectionName}">
    <server-name>{RPASServerName}</server-name>
          <daemon-port>{Port Number}</daemon-port>
           <domain>
        <domain-name>{DomainName}</domain-name>
        <domain-path>{Location where the domain is installed}</domain-path>
           </domain>
   </connection-spec>
   ```

   > **Note:** In the example above, placeholders have been used as values for the parameters. Ensure that you replace the placeholders with the relevant values.

   Where,

   - **connection-spec name** – Name for the connection specification. This will match the name for the taskflow configuration and resource files. Each must have a unique name.
   - **server-name** – The host where the RPAS Server is installed and the DomainDaemon process is running.
   - **daemon-port** – The port specified when starting the DomainDaemon.
   - **domain-name** – The name that will be displayed to the user on the login screen
   - **domain-path** – Location where the domain is installed.

   > **Note:** Multiple domains on the same server can use the same configuration.

3. Save and close the **ProfileList.xml** file.

4. In the **<RPAS_Fusion_Client_Installation>/config** directory, create a new folder and specify the domainConnectionName or connection-spec name as the folder name.
5. Navigate to the **fusionClient** directory located within the directory where the domain is installed. This folder contains the following files that define the Activity Taskflow configuration:
   - **taskflowBundle.properties**
   - **taskflow.xml**

   When you created the domain using the rpasInstall script, these files were generated based on the taskflow configuration you set up in the RPAS Configuration Tool. For more information on the Taskflow Configuration, refer to the *RPAS Configuration Tools User Guide*.
6. Copy the two files to the domain name folder you created in step 4.
7. Rename the **Taskflow.xml** file to include the domain name. The new file name must now read as **Taskflow_<domainConnectionName>**.xml. Where <domainConnectionName> is the domain connection name or connection-spec name.
8. Create a **resources** subfolder within this location and move the **taskflowBundle.properties** file to the **resources** subfolder.
9. In the **resources** subfolder, rename the **taskflowBundle.properties** file to include the domain name. The new file name must now read as **<domainConnectionName>Bundle.properties**. Where <domainConnectionName> is the domain connection name or connection-spec name.
10. For the changes to take effect, restart the RPAS and WebLogic servers.

3

Patch Installation

Due to the introduction of new hierarchies in 13.2.1, Item Planning is not upgradeable from previous versions to 13.2.1. You must perform a full installation of Item Planning in order to accommodate these changes. See the Full Installation: UNIX Environments chapter for full installation instructions.

For more information about the location hierarchy changes, see the *Item Planning Operations Guide*.